

# CB ASSESSMENT CHECKLISTS



## CHECKLIST #2:

### Planning and conducting a capacity building participant focus group

*This is an alternative to collecting participant data through a survey.  
The steps to conduct a survey can be found in Checklist #1.*

#### Step 1: Decide who to invite and how to invite them

##### ☐ 1a: Decide who to invite

Determine how to gather a small group of participants that can provide information **representative** of all participants. Consider recruiting:

- By characteristics of interest (e.g., location, age, type of participant, etc.)
- By types of capacity building services received
- Randomly (e.g., every 10<sup>th</sup> participant on an alphabetical list)

##### ☐ 1b: Develop participant recruitment methods

Depending on your selected participants and your resources, figure out the **best way to reach them**. Consider sending an email, creating a flyer to post in certain locations, or conducting phone calls. Be sure to include information about the purpose of the focus group, and to provide refreshments and/or incentives, if possible.

#### Step 2: Develop focus group discussion questions

##### ☐ 2a. Develop focus group discussion questions

Focus group questions tend to be more **open-ended** than survey questions and allow for deeper discussion.

##### ☐ 2b. Review the questions

Review the discussion questions **with the advisory group or people close to the capacity building work** as well as those not as involved to ensure the questions are clear and the information will be useful. Allow sufficient time for feedback and revisions. Often the review process causes the overall purpose of the focus group to be clarified with some questions being deleted and others added.

##### ☐ 2c. Consider adding a brief survey

Consider **creating a brief survey** to be administered at the focus group that collects basic demographic information and two or three key open-ended questions that will allow the more introverted or quiet members of the group to provide their input in a written format. The survey could be administered at the end of the focus group discussion.



### Step 3: Conduct the focus group

- ☐ **3a.** Start with an explanation and icebreaker  
Before you begin asking questions, **explain the purpose of the focus group and how the information shared will be used.** Also ask everyone to go around, share their name and answer a quick icebreaker question. Icebreaker questions could be about how they first learned about your agency or to briefly share about their organization. This helps participants feel more comfortable with the group.
- ☐ **3b.** Ask your questions but stay flexible  
Be sure the person facilitating the focus group discussion has a good grasp of the information your agency is interested in and is able to **capture the information while keeping the discussion organic and flowing.** Have a second person in the room to take notes, if possible.

### Step 4: Use the focus group data

- ☐ **4a.** Use the data purposefully  
Meet with relevant staff to discuss the focus group findings and how the results can be used. Use of focus group results will depend on the focus group's purpose (internal learning, external proving and actionable recommendations).
- ☐ **4b.** Reflect with a focus  
If possible, schedule the focus group and analysis in line with existing opportunities scheduled to **reflect as an organization** (e.g., staff retreats).